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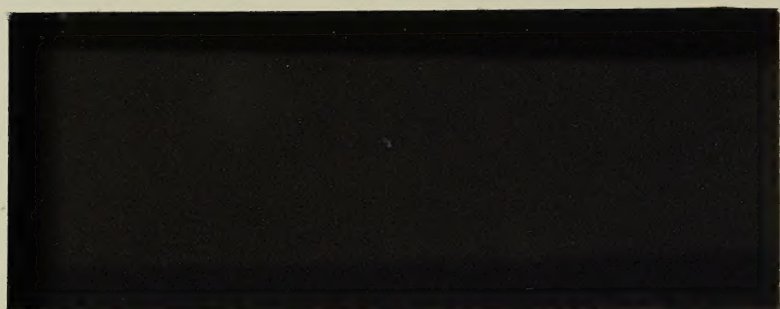


THE DEMAND FOR INDUSTRIAL
MALL SPACE IN THE CITY OF
HAMILTON
JUNE, 1973

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CENTRE FOR APPLIED RESEARCH
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THE DEMAND FOR INDUSTRIAL
MALL SPACE IN THE CITY OF
HAMILTON
JUNE, 1973

SUBMITTED TO: HAMILTON ECONOMIC DEVELOPMENT COMMISSION

PREPARED BY: DR. L. KING

FOR

THE CENTRE FOR APPLIED RESEARCH AND ENGINEERING DESIGN,
INCORPORATED
McMASTER UNIVERSITY, HAMILTON, ONTARIO

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SUMMARY OF PRINCIPAL FINDINGS AND RECOMMENDATIONS

This study was designed to estimate the level of potential demand for manufacturing space in industrial malls among one hundred or so light manufacturing companies in the city of Hamilton. The major findings and the associated recommendations are summarized below. The text of the report which follows discusses in detail the methods and results of the study.

1. Among the 45 or so companies that either responded to a questionnaire survey or a personal interview, there is a high degree of interest in the idea of industrial malls located in the city of Hamilton. The potential demand for actual manufacturing floor space in such malls among these 45 companies is estimated to be in excess of 400,000 square feet. This demand clearly is high enough to warrant serious efforts being made to attract investment capital for the development of industrial mall(s).

2. Of the estimated total demand for manufacturing floor space in malls mentioned above, more than half is associated with the needs of three clothing manufacturers -- The Coppley Noyes & Randall Ltd., (Cambridge Clothes), Cluett-Peabody and Co., and Beauty Industries Ltd. These three companies

expressed considerable interest in the concept of industrial malls (it should be noted that in the case of Cluett-Peabody the discussion involved only the local Hamilton manager and not the company executives in Kitchener). The clothing industry with its reliance upon female labour, its minimal environmental impacts, and its easily satisfied transportation demands is ideally suited to housing in industrial malls located close to the downtown of any large city. The recently completed Chase Commercial Centre Fashion Plaza in the garment district of Montreal is an example of how an industrial mall can cater to this industry particularly well.

It is recommended that initial plans for the development of industrial mall space in Hamilton emphasize the needs of such clothing companies. The estimate of the demand for mall space for such companies (over 200,000 square feet) may well be on the conservative side especially since some other companies in the same industry, in particular Sainthill Levine Uniforms Canada Ltd, could not be contacted in time.

3. In the case of the three clothing companies referred to above, the need for new space is an urgent one. Indeed, if plans for the development of industrial mall space in Hamilton, catering to the needs of these companies, are to be pursued, then firm commitments have to be made within the next twelve to eighteen months. In the case of The Coppley Noyes & Randall Ltd, whose management expressed the strongest

support for the industrial mall concept, the need is even more pressing and this company already is searching for new space.

4. Given the total demand for female labour associated with the three clothing companies mentioned above (estimated to be more than 1,100 persons), and the fact that the majority of these workers are dependent upon public transit systems for the journey to and from work, then it is essential that any related industrial mall development be located near the downtown of the city, the point of maximum accessibility in terms of the public transit system. In line with this requirement, the location of industrial mall(s) within the areas currently zoned for industry in the north-end district of Hamilton would seem to be ideal.

5. The provision of added employment opportunities in light manufacturing in the north-end of Hamilton could give further stability to the residential district in the north of this area. The desirability of maintaining and enhancing the neighbourhood character of this district should be an explicit consideration in any development plans related to industrial malls in the north-end of Hamilton.

6. In the case of some of the companies interested in industrial mall space (but not the clothing firms) there

exists a significant demand for parking space and warehouse space. The latter consideration, however, raises a separate issue in regard to the future of Hamilton as an industrial centre and a separate study should be made of the potential demand for warehouse space in the city. This might be tied in with an assessment of the probable impact of the airport development, if it takes place, upon the industrial character of the city.

At this point it is recommended that plans for industrial mall development should proceed almost independent of these other considerations. The needs of the clothing industry alone appear to justify such actions.



THE DEMAND FOR INDUSTRIAL MALL SPACE
IN THE CITY OF HAMILTON

1.0 STUDY DESIGN

In the study reported on here, the emphasis was placed on estimating the level of demand for industrial mall space among Hamilton firms, with special reference to a possible location of such malls in the north-end of the city.

It should be emphasized at the outset that this study provides only crude estimates of the potential demand for industrial mall space. Obviously, the interest of companies in industrial malls will be a function of space rental charges and so on, and until some actual costing is done of possible developments and some "hard" data are provided to the interested companies then the estimates of demand can only be regarded as tentative ones. Furthermore, it was not possible within the time limits of this study to attempt any detailed inventory of the sites that might be considered as possible locations for industrial malls even within the areas zoned for industry in the north-end.

In order to estimate the demand for manufacturing space, a questionnaire was sent out to one hundred and six companies within the city (Appendix A). The sample was selected by the Hamilton Economic Development Commission,

and included firms belonging to the following categories defined by the Commission:

- a. companies with insufficient capital to build their own plants;
- b. companies with a preference for leased property, rather than for buying;
- c. companies requiring space for expansion on, or near, their present locations;
- d. companies requiring a location in the north-end due to their present location, its proximity to a specific labour market, warehousing, or downtown;
- e. companies which feel they must relocate because of a proposed neighbourhood plan;
- f. companies requiring a new location because of rezoning;
- g. companies requiring new locations due to expropriation.

To supplement the questionnaire, information and opinions from many of the city's businessmen were sought. This was accomplished by sending a letter to some four hundred businesses within the city (Appendix B). The response level from the letter was far lower than that for the questionnaire (around 43 percent of the questionnaires were returned, as opposed to less than a ten percent return for the letter).

As an additional follow-up step, personal interviews were conducted with The Coppley Noyes & Randall Ltd. (Cambridge Clothes), Cluett-Peabody and Co., Lifesavers Ltd., and Canadian Silk Manufacturing Co. and a telephone inter-

view was held with the President of Beauty Industries Ltd. Attempts to arrange an interview with the executives of Sainthill Levine Uniforms Canada Ltd., unfortunately have proven to be unsuccessful.

Firms responding to the questionnaire were primarily small, ranging in size from one employee to several hundred (see TABLE 1). On the other hand, the letter was received by firms ranging in size from one employee to several thousand employees.

TABLE 1: SIZE OF FIRMS RESPONDING TO QUESTIONNAIRE

SIZE CLASS (Nos. employees)	NUMBER OF FIRMS
1 - 20	30
21 - 50	6
51 - 100	2
101 - 200	5
201 - 500	1
501 - 1000	1

2.0 STUDY RESULTS

2.1 Estimates of Total Demand for Mall Space.

Of those firms responding to the questionnaire more

than half indicated that they are considering a move within the next five years. The majority of these firms feel that they are being forced to relocate because of the space limitations with which they are faced, but other reasons that were cited included proposed neighbourhood plans and rezoning. Around sixty percent of the companies responding indicated a preference for a location in the north-end and cited as attractions its proximity to a specific labour market, warehousing or the downtown area. It should be noted in this respect that more than half of the firms answering the questionnaire are presently located in the north-end.

Of those firms considering a move within the next five years, according to the questionnaire returns, whether because of space limitations or some other factors, some thirteen companies indicated that they might locate within an industrial mall if such were available. These firms are listed in Table 2. Nine of these companies indicated that they would prefer a location in Hamilton's north-end, while two (A.B.C. Movers and Adap Sheet Metal Co. Ltd.) indicated a preference for the east of the city and two others preferred a location near the 403 Highway.

TABLE 2: FIRMS INTERESTED IN MALL SPACE

- A.B.C. MOVERS -- furniture moving and storage
 - ADAP SHEET METAL CO. LTD -- sheet metal and light steel fabricating
 - BARBER-ELLIS OF CANADA LTD -- fine paper, printing supplies, envelopes
 - CANADIAN SILK MFG. CO. LTD -- industrial laundry
 - CURRIE PRODUCTS LTD -- roofing materials
 - EMBREE INDUSTRIES LTD -- stamp and stencil company
 - FELTON BRUSHES LTD -- brushes
 - INDUSTRIAL PATTERN & MODEL -- wood, metal and plastic patterns and models
 - LLOYDS GLASS LTD -- glass jobbers
 - MOTIVATION INDUSTRIAL EQUIPMENT LTD -- handling equipment
 - ROBERT SHEET METAL CO. LTD -- sheet metal
 - ROYAL OAK DAIRY LTD -- dairy stores
 - SUPERIOR ENGRAVERS LTD -- graphic arts
-

In Table 3 detailed data are provided on the nine companies that expressed an interest in industrial malls located in the city's north-end. These data suggest that the demand for manufacturing space is in excess of 80,000 square feet and that warehouse space accounts for a further demand of more than 55,000 square feet.

The questionnaire returns did not include information on any of the clothing firms and these are considered

TABLE 3.

SPACE REQUIREMENTS OF FIRMS INTERESTED IN AN INDUSTRIAL MALL

LOCATION IN NORTH-END

AREA (in square feet)									
	Adap	Barber- Ellis	Currie	Embree	Felton	Lloyds	Motiv.	Robert	Royal Oak
Site area	12,500	35,000	130,000	30,000	348,480	*	15,000	10,000	70,000
Office area	350	1,000	6,000	3,000	2,000	*	2,000	800	5,200
Warehouse area	2,000	20,000	30,000	3,000	*	*	2,000	200	-
Mfg. area	6,500	-	30,000	14,000	*	*	6,000	4,000	24,000
Other	-	-	-	-	*	*	-	-	20,000
Floor area (total)	8,850	21,000	66,000	20,000	30,000	*	10,000	5,000	49,200

* Information not supplied

separately in the next section of this report. But even without these firms there clearly exists a sizeable demand for industrial mall space located in the north-end of Hamilton. A mall involving modular units each of 5,000 square feet could cater to the needs of those six firms in Table 3. that require manufacturing space.

Unfortunately the items in the questionnaire relating to acceptable lease charges were usually unanswered. Three companies however, did provide some data. Barber-Ellis indicated a willingness to pay \$1,200 - 1,500 per month for building space (exclusive of utilities and taxes) but their requirement recall, is primarily for warehouse space (20,000 square feet, Table 3). Embree Industries Ltd, that requires some 14,000 square feet of manufacturing space mentioned \$1,500 in the same context, and Robert Sheet Metal Co. Ltd (4,000 square feet of manufacturing space) suggested \$400 as an acceptable lease rate for building space only.

The thirteen firms expressing an interest in industrial malls were primarily small companies employing less than 50 persons per firm. Only three of the companies employed more than 50 persons; in the case of Canadian Silk Mfg. Co. Ltd. and Royal Oak Dairy Ltd. the figures were 130 and 120 respectively.

The employees of these firms appear to be located throughout the city in terms of their places of residence, and use the automobile, for the most part, to get to work.

The firms report that labour is an important cost of production, and, therefore, of importance when decisions are made as to where to locate. The labour employed is primarily skilled or semi-skilled in character.

Typically, more than half of the inputs used by the firms interested in industrial malls are supplied by firms within Hamilton. The transport of these materials is primarily by truck and only a few of the firms felt that the procurement of inputs would influence their decision as to where to locate.

Market considerations also were addressed in the questionnaire. A majority of the firms interested in malls sell most of their products outside of Hamilton, and again, these companies typically use trucks for moving their products. In sixty percent of the cases, it was felt that market considerations would influence their location and significantly, more than half of these firms indicated that they have considered locating outside of Hamilton, in order to overcome their space problems.

2.2 Demand Associated With Clothing Manufacturers

The brightest prospects for industrial mall development within the city of Hamilton appear to be associated with the needs of certain clothing manufacturers. Three specific companies are discussed now in turn.

2.2.1 The Coppley Noyes & Randall Ltd.

This company, presently located on Merrick Street, is engaged in a search for a new location. Their interest in industrial malls is evident in the following quotations from a letter which Mr. M.E. Enkin wrote in reply to the letter sent him by CARED in connection with this project. Mr. Enkin wrote:

"Answering your letter of April 16th, we are very much in sympathy with the idea of providing industrial mall space along the lines indicated in your letter.

An industry such as ours cannot readily accommodate itself to transfer its operations to the peripheral of the city, which is about the only land available for industrial expansion.

We employ predominantly female labour, for whom public transportation is of paramount importance and we are certain we would have great difficulty in keeping absenteeism and labour turnover to a minimum, were we to move to the outlying areas.

In large cities such as Montreal, there are large loft buildings available, particularly geared to the needle trade industries where space could be leased regardless of how large the manufacturing unit might be.

We employ some 700 people and this labour force could be expanded more did our physical capacity permit. It seems to us, therefore, of the utmost importance that if industrially geared land is available within the city, then projects such as you outline would have a great deal of merit."

A subsequent personal interview by Dr. King of Messrs. M. and L. Enkin confirmed their interest in the industrial mall idea but also underscored the urgency of their need. It is doubtful that this company will remain interested unless something concrete is planned within the next twelve

months or so. Messrs. Enkin expressed preference for a single-floor manufacturing operation involving somewhere between 75,000 and 100,000 square feet of space.

2.2.2 Cluett-Peabody & Co.

The questionnaire for this company had to be forwarded by the local manager to the head office in Kitchener for review and unfortunately, it has not yet been returned to the project office. However, a personal interview was arranged with Mr. M. Mancini in Hamilton. The plant in Hamilton is engaged wholly in the assembling of shirts with the cutting and packaging operations being based in Kitchener. Mr. Mancini expressed some uncertainty over the future of the Mercury Mills building in which they are currently located and indicated that within the next two years or so they might well have to move. The plant employs more than 400 persons, mostly women, and Mr. Mancini agreed that a downtown location would be highly desirable in terms of having maximum access to the sources of labour. An estimate of the desirable manufacturing floor space is around 100,000 square feet.

This company might well be one that could be enticed by the availability of well-designed industrial mall space to expand upon its Hamilton operations. The possibility of having the company transfer some of its cutting and/or packaging operations to Hamilton, provided industrial mall space was

available, would certainly warrant serious consideration.

2.2.3 Beauty Industries Ltd.

Mr. R.G. Wilson, Chairman of the Board, replied by letter and was contacted by telephone by Dr. King. There is here a possible firm candidate for industrial mall occupancy. The company has about 19 months to run on its lease of the building on Sherman Avenue but the owner has declared bankruptcy. The company intends to bid on the building and Mr. Wilson has agreed to inform the project of the outcome of this bid within the next two weeks or so. In the event that their bid is rejected then they will likely have to relocate their operation which currently employs 170 persons, mostly women. Their total space requirement is 60,000 to 75,000 square feet of manufacturing space. But even if the company is successful in purchasing the building it is located in, Mr. Wilson feels that the leasing of an additional 10,000 square feet in an industrial mall would undoubtedly be more economical than the renovation and conversion of the remaining space in the presently occupied building. He would prefer to lease this space rather than attempt to convert it to manufacturing operations, and to accommodate the company's expansion in an industrial mall, if one were available.

In summary then, the picture as regards these clothing companies is, in one sense, encouraging in regard to the

possible development of industrial mall space. But the phasing of the development over time appears as a major hurdle, and it may not be possible, for example, to cater to the short-run needs of The Coppley Noyes and Randall Ltd. company which is perhaps the strongest supporter of the industrial mall concept, at least among the companies contacted in this study.

It is unfortunate that data have not yet been obtained for Sainthill Levine Uniforms Canada Ltd. The original questionnaire that was sent to them went astray in the company organization and Mr. S. Pearce in Toronto, when contacted by 'phone, preferred to have another questionnaire sent to him directly rather than to arrange for an interview. This second questionnaire should be received back within a week or so of the date of this report.

3.0 NORTH-END OF HAMILTON AS LOCATION FOR INDUSTRIAL MALLS

For the purpose of this study, the "North-End" of Hamilton referred to that area bounded on the south by Main Street, on the west by Queen Street, on the north by Burlington Street (or the Bay), and on the east by Wellington Street. This is somewhat different from the usual designation of the north-end, which places this area north of the

Canadian National Railway Line.

The north-end of Hamilton possesses a mix of land uses, including residential (single-family housing and high-rise developments), recreational, commercial (including the City's Central Business District), and light and heavy industry. For the study, maps were prepared showing the land-use zoning in the area (as of 1972), and the existing industrial activity in the area.

The maps show that the existing industry is concentrated primarily below Strachan Street, with little north of that being zoned or used for industrial purposes. Only the land along the Bay in this part of the City is zoned for industry (but this sub-area is not included if Burlington Street acts as the northern boundary of the study area). Only three locations exist north of Strachan Street where industrial activity is carried out at the present time. In addition, north of Strachan, new town-houses and high-rise apartments have been developed. Between Wood Street on the north, Simcoe Street on the south, Hughson Street on the west and Mary Street on the east, there has also developed a large complex of schools (public and separate). The industry which exists in this district therefore, constitutes a non-conforming use. South of the Canadian National Freight Yards and Strachan Street there is considerable industrial activity and large acreages devoted to manufacturing, storage and parking

uses.

In Table 4 the various manufacturing activities within the city's north-end are grouped on the basis of employment. Of those employed in manufacturing in the north-end, 26.3 percent of these are in metal products, 18.3 percent are in printing and allied industries, and 14.1 percent are in the production of textiles and textile products. Those industries

TABLE 4: NORTH-END HAMILTON
MANUFACTURING (by employment)

Manufacturing Categories	Employment	Percent
Food and Beverages	253	5.3
Textiles and Textile Products	677	14.1
Printing and Allied Industries	900	18.8
Primary Metal Products	140	2.9
Metal Products	1261	26.3
Transportation	9	0.2
Machinery	77	1.6
Electrical Products	520	10.8
Non-metallic Products	633	13.2
Other Manufacturing	332	6.8
TOTAL	4802	100.0

Source: Derived from data in the Hamilton Industrial Index, 1973.

present in this area are for the most part small ones typically employing between one and twenty employees. Two are very large, however, with approximately four to five hundred employees each.

The north-end possess certain locational advantages for light manufacturing industries. Above all, it is an ideal location for those industries requiring large numbers of employees who must rely upon public transit systems for journeying to and from work. The physical character of Hamilton city and the related spatial arrangement of residential districts within the city reinforces the centrality of this north-end district. Further, assuming that the widening of York Street is carried out then the district's accessibility to the 403 Highway will be considerably improved and industries dependent upon truck transportation should be well-served in this regard.

The area, however, is not without its problems for industrial development. There are, for example, well established residential areas within the north-end and any new industrial developments should not be at the expense of these residential areas. Because of its proximity to the downtown area, the north-end also is an area of high land and development costs and for many industries these costs are prohibitive and have prompted the suburbanization of much manufacturing activity. Traffic congestion means increased transportation costs and in particular, the

routing of truck traffic into the downtown area is often viewed with disfavour by planning authorities. Perhaps for this reason alone the possibility of acquiring sites for industrial mall development adjacent to the proposed York Street routeway should be emphasized. The area bounded on the west by Queen Street, on the south by Cannon Street, on the east by Bay Street and on the north by Barton might well provide such suitable locations.

It should be emphasized that throughout this study it has been assumed that industrial mall development will require new construction. For the clothing companies in particular, single floor manufacturing operations are highly desirable and it is unlikely that existing buildings could be rennovated to accommodate such users.

4.0 FUTURE OF MANUFACTURING IN HAMILTON: SOME GENERAL CONCLUSIONS.

Of those firms responding to the questionnaire, seventy-five percent felt that Hamilton has a good to excellent future assured as an industrial centre. Eighty percent also felt that the planned airport development will have a good effect on the city's industrial future, but no company was really explicit in spelling out how its own plans might be affected.

On the negative side in regard to Hamilton's industrial

future, the comment was often made that alternative locations in areas such as Burlington did appear attractive by virtue of the amount of space available there for expansion. Also, it should be noted that Lifesavers Ltd. commented to the effect that the programme of DREE grants for industrial expansion in the Maritimes appears very attractive to their company at this time when expansion of their manufacturing plant is likely to be required.

Sixty percent of the firms responding to the questionnaire felt that industry could be revived or stimulated in Hamilton's downtown area and they viewed the development of an industrial mall as an excellent stimulus to such a revival. Indeed, it could well be that the demand for industrial mall space is grossly underestimated in this report and that, when faced with the actual availability of mall space, many other companies might respond much more positively!

APPENDIX A - QUESTIONNAIRE

COMPANY _____

ADDRESS _____

TYPE OF BUSINESS _____

1. How long have you been located at your present address? _____

2. If you have been located here for less than five years, where were you previously located?

How long were you located at that address? _____

Why did you leave that location? _____

SPACE AND LAND REQUIREMENTS:

3. Is your present site area adequate (for plant space, parking, etc.) to meet your present needs?

(a) Yes _____

(b) No _____

4. If your present site area is inadequate, what would be an appropriate site area?

_____ square feet

5. Is the present floor space in your manufacturing plant adequate to meet your present and future needs?

(a) Yes _____

(b) No _____

6. If the present floor space is inadequate, what would be the desired

(a) office area _____ square feet

(b) warehouse area _____ square feet

(c) manufacturing area _____ square feet

(d) other (specify) _____ square feet

(e) total floor area _____ square feet

7. If your present site and plant space is inadequate, when will the need for additional space become critical? Within

- (a) one year _____
- (b) two years _____
- (c) three years _____
- (d) four years _____
- (e) five years _____

8. Have you ever considered moving out of Hamilton because of any space limitations which you may face here?

- (a) Yes _____
- (b) No _____

9. If you have considered moving out of Hamilton, where to?

10. Are you considering a move within the next five years?

- (a) Yes _____
- (b) No _____

11. If you are considering a move within the next five years, are you being forced to relocate due to

- (a) rezoning _____
- (b) proposed neighbourhood plans _____
- (c) expropriation _____
- (d) other (specify) _____

12. If additional space is required or a move is being contemplated, would you consider locating in an industrial mall if one was available?

- (a) Yes _____
- (b) No _____

3. If you would consider locating in an industrial mall, where would you prefer that it was located?
- (a) the north-end of Hamilton _____
 - (b) other (specify) _____
4. If you would prefer a location in the north-end of Hamilton, is this due to
- (a) present location _____
 - (b) proximity to labour market _____
 - (c) proximity to warehousing _____
 - (d) proximity to downtown _____
 - (e) other (specify) _____
5. If you would consider locating in an industrial mall, would you prefer to
- (a) lease _____
 - (b) buy _____
6. If you prefer to lease, what do you feel would be an acceptable lease rate for the building space only (excluding utilities and taxes)
- _____ per month

ABOUT REQUIREMENTS:

7. How many employees do you have?
- (a) male _____
 - (b) female _____
 - (c) total _____
8. What type of labour do you employ?
- (a) skilled _____
 - (b) semi skilled _____
 - (c) unskilled _____

9. Where do the majority of your employees live?
- (a) the north-end of Hamilton _____
- (b) other (specify) _____
10. What percentage of your employees use the following means of transportation to get to work?
- (a) automobile _____ %
- (b) public transportation _____ %
- (c) walk _____ %
11. Is labour a major cost of production for your firm?
- (a) yes _____ (b) no _____
12. What percent of the total cost of production, would you attribute to labour costs?
- _____ %
13. If you were considering a relocation of your plant, would labour considerations influence your choice of a new location?
- (a) yes _____
- (b) no _____
14. If labour considerations would influence your choice of a new location, how would they do so?
- _____
- _____
- _____
- _____
- _____

INPUT REQUIREMENTS:

15. Where do you get most of your raw materials from?
- (a) firms in Hamilton _____
- (b) firms outside of Hamilton _____

26. If you get these materials from Hamilton firms, could you please name your major suppliers?

27. How are these materials moved to you? _____
28. What percent of your total production costs could be attributed to
(a) the cost of materials _____ %
(b) the cost of transporting these materials _____ %
29. If you were considering a relocation of your plant, would raw material considerations influence your choice of a new location?
(a) yes _____
(b) no _____
30. If raw material considerations would influence your choice of a new location, how would they do so?

MARKET REQUIREMENTS:

31. Where do you sell the major portion of your product(s)?
(a) within Hamilton _____
(b) outside of Hamilton _____
32. If you sell within Hamilton, could you please name your major customers?

33. How do you move your product(s) to market? _____

34. Is this movement of goods a major cost to you?

(a) yes _____

(b) no _____

35. What percent of your total costs would you attribute to the movement of your product to market?

_____ %

36. If you were considering a relocation of your plant, would market considerations influence your choice of a new location?

(a) yes _____

(b) no _____

37. If market considerations would influence your choice of a new location, how would they do so?

38. If you are contemplating a relocation, how would a decision be reached concerning the new location?

(a) Would you consider several alternative locations?

(i) yes _____

(ii) no _____

(b) Would the availability of mall space be an overriding factor in your decision?

(i) yes _____

(ii) no _____

(c) Would you consult someone on your location decision?

(i) yes _____

(ii) no _____

If you would consult someone, who? _____

- (d) Where would you seek information to aid you in your decisions as to where to locate?

39. What would you consider to be the three most important factors affecting your location?

(a) _____

(b) _____

(c) _____

40. What is your feeling about the future of Hamilton as an industrial centre?

41. Do you feel that industry can be revived or stimulated near the downtown area in Hamilton?

(a) yes _____

(b) no _____

42. If you feel that industry can be revived or stimulated near the downtown area in Hamilton, how?

43. What do you predict will be the effects on industry in Hamilton of the proposed airport expansion?



April 16, 1973.

Dear Sir:

We have recently been engaged by the Hamilton Economic Development Commission to conduct a survey on the requirements of industry for industrial mall space in the City of Hamilton.

If as a result of this study, a great need for leased manufacturing space is identified, the Commission will initiate action in an attempt to have industrial malls built in the north end of the City on land already zoned industrial.

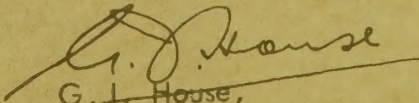
A successful conclusion to this type of study could mean industrial mall space, on a leased basis, available, in small modules and in larger quantities, to companies wishing to expand or to remain in close proximity to an existing location, labour market, central business district and local public transportation.

Due to the large number of companies in the Hamilton area an in-depth interview with each one would prove impractical from the viewpoint of time and cost. However, while this form of information gathering is being carried out with a representative sampling of Hamilton firms, we are vitally interested in the views of all companies in the City on this matter of industrial mall space.

In this light, we would appreciate receiving any views or information you may have on this matter.

In anticipation of your assistance and co-operation we extend our thanks.

Yours very truly,


G. J. House,
President.

GJH/st

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